

ProExpress User Manual

Rev 3.0

Last Updated April 6, 2015

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Prerequisite

For the best experience, please be sure to use one of the following supported browsers:

- Internet Explorer
- Firefox
- Chrome

ProExpress Conventions

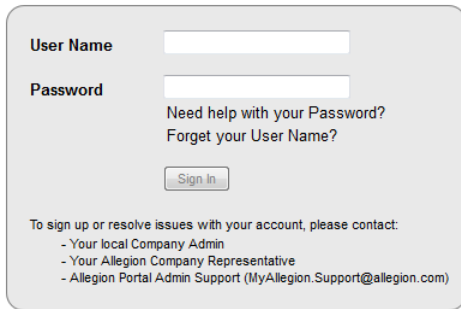
ProExpress has several basic conventions employed throughout the application. The following sections review these basic conventions.

- **Required fields** are text entry fields that require information in order for the system to operate. These field names are denoted by an (*) and are required fields. A user must provide information for these fields to continue building your Customer, Contact, Quote, etc.
- **The Info Icon**  denotes entered information is either invalid or needs additional input. For example, if you enter alphabetical characters in a field that requires a numerical entry, the Info icon appears.
- **Drop down menus** (or option lists) display a menu when clicked. They allow the user to type information into the box or select an item from the list. For example, if you want to add a customer's address, the State Option list allows you to choose the state or type it. As you type, the list scrolls based on the initial entry letters.
- **Tool tips**-briefly appear to display a tool name and function. Direct your mouse pointer above a tool to display the tool tip
- **Inactive Options** –When an option appears in gray, the option is inactive (not available for use). Inactive Options may mean that you need to enter more information in other areas to activate the grayed options.
- **Immediate Save** allows users to progress through the ProExpress application without manually saving Orders, or anything else. As soon as the user clicks off a field that field is saved. Seamlessly Create, Edit , or Navigate between entities while progress is saved automatically along the way

Accessing ProExpress

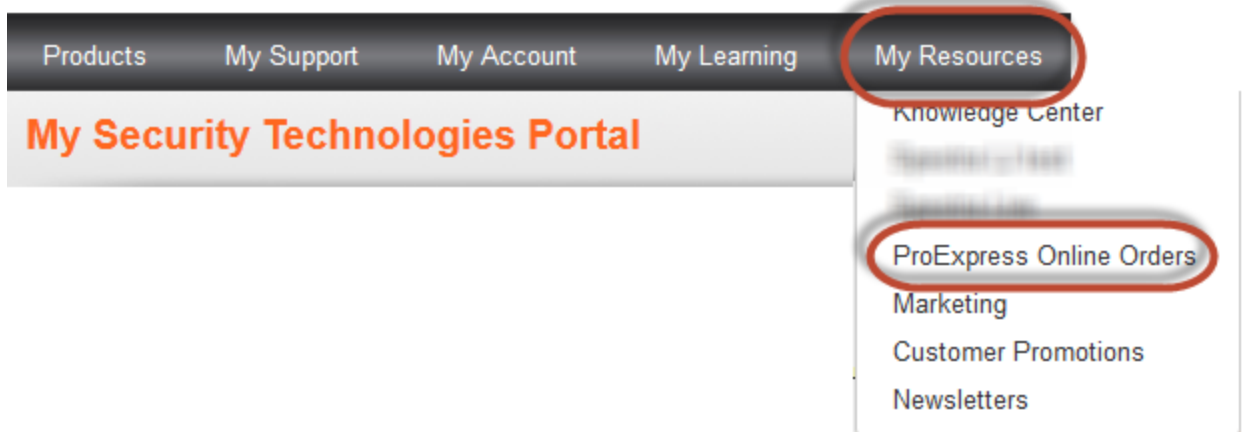
ProExpress is accessible through the Partner Portal.

1. Launch any compatible browser and navigate to <https://portal.allegion.com/>
2. Login with your credentials when prompted



The login form is a light gray box with a white border. It contains two input fields: 'User Name' and 'Password'. Below the 'Password' field are two links: 'Need help with your Password?' and 'Forgot your User Name?'. A 'Sign In' button is located below these links. At the bottom of the form, there is a section titled 'To sign up or resolve issues with your account, please contact:' followed by three bullet points: '- Your local Company Admin', '- Your Allegion Company Representative', and '- Allegion Portal Admin Support (MyAllegion.Support@allegion.com)'.

3. Navigate to My Resources then to ProExpress Online Ordering



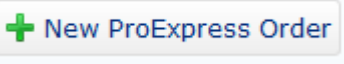
If the link does not appear in the menu drop down, please contact your company admin or Allegion sales representative to activate your online ordering account.

- After the application loads, the main Order Search screen will appear

Customer	PO#	Order Type	Created by	Created on	Last Modified by	Modified on	Status	ID
	IG5	ProExpress	Press1c, Pro	10/13/2014 16:00	Press1c, Pro	10/13/2014 16:00	Submitted	SOMF000001

This screen displays all submitted and open orders and is searchable via the fields at the top

Building an Order

- After logging into ProExpress click the  button located on the Order Search screen
- This will create a new shopping cart and loads the product selection grid

SKU	Mfr	Catalog Number	Finish	Description	Price	Quantity
034302-32	FAL	425-PKG/2	US32D	SEX BOLT	18.00	
043156145003	FAL	D211B 134	613	CLASSRM DEADBOLT	71.00	
043156145027	FAL	D211B 134	626	CLASSRM DEADBOLT	65.00	
043156145256	FAL	D211P6 134	613	CLASSRM DEADBOLT	71.00	
043156145270	FAL	D211P6 134	626	CLASSRM DEADBOLT	65.00	
043156146383	FAL	D241B 134	613	SGL CYL X TURN DB	69.00	
043156146451	FAL	D241B 134	626	SGL CYL X TURN DB	63.00	
043156146550	FAL	D241P6 134	613	SGL CYL X TURN DB	69.00	
043156146918	FAL	D241P6 134	626	SGL CYL X TURN DB	63.00	
043156147106	FAL	D261 134	613	TURN, INSIDE ONLY	54.00	

- Search for a product by typing in the SKU, Manufacturer Code, Catalog Number, Finish, Description or list price or any combination of the above. As the fields are populated the list is automatically filtered to meet the search criteria.

Orders

Order SOMF000002

Print
Checkout
More...

Header
Items
Comments

☒ Enable Contains Search

	SKU	Mfr	Catalog Number	Finish	Description	Price	Quantity
			18				
<input type="checkbox"/>	42084	FAL	SC60-18	689	MOUNTING PLATE - TOP JAMB	28.00	
<input type="checkbox"/>	42123	FAL	SC60-18PA	689	MOUNTING PLATE - PUSH SIDE	28.00	
<input type="checkbox"/>	42133	FAL	SC60-18PA	695	MOUNTING PLATE - PUSH SIDE	28.00	
<input type="checkbox"/>	42136	FAL	SC60-18	695	MOUNTING PLATE - TOP JAMB	28.00	
<input type="checkbox"/>	42159	FAL	SC80-18	689	MOUNTING PLATE - TOP JAMB	28.00	
<input type="checkbox"/>	42162	FAL	SC80-18PA	689	MOUNTING PLATE - PUSH SIDE	28.00	
<input type="checkbox"/>	42179	FAL	SC80-18	695	MOUNTING PLATE - TOP JAMB	28.00	
<input type="checkbox"/>	42182	FAL	SC80-18PA	695	MOUNTING PLATE - PUSH SIDE	28.00	
<input type="checkbox"/>	43066	FAL	SC70-18	689	NARROW FRAME BACK PLATE	47.00	
<input type="checkbox"/>	43067	FAL	SC70-18	695	NARROW FRAME BACK PLATE	47.00	

Page 1 of 2
Viewing 1 - 10 of 18
Add To Cart

Note: Checked by default, the *Enable Contains Search* in the top left corner the search will return results with any of the search criteria contained within the results. When uncheck, the search will return results that start with the search criteria.

Expert Hint-For faster results, if you know the exact product you are searching for, as listed in the price book, uncheck *Enable Contains Search*.

- When the product is found, click the check box to the left of the line

Orders

Order SOMF000002 [Print](#) [Checkout](#) [More...](#)

Header **Items** Comments

☒ Enable Contains Search

<input type="checkbox"/>	SKU	Mfr	Catalog Number	Finish	Description	Price	Quantity
<input type="checkbox"/>			18				
<input type="checkbox"/>	42084	FAL	SC60-18	689	MOUNTING PLATE - TOP JAMB	28.00	
<input checked="" type="checkbox"/>	42123	FAL	SC60-18PA	689	MOUNTING PLATE - PUSH SIDE	28.00	
<input type="checkbox"/>	42133	FAL	SC60-18PA	695	MOUNTING PLATE - PUSH SIDE	28.00	
<input type="checkbox"/>	42136	FAL	SC60-18	695	MOUNTING PLATE - TOP JAMB	28.00	
<input type="checkbox"/>	42159	FAL	SC80-18	689	MOUNTING PLATE - TOP JAMB	28.00	
<input type="checkbox"/>	42162	FAL	SC80-18PA	689	MOUNTING PLATE - PUSH SIDE	28.00	
<input type="checkbox"/>	42179	FAL	SC80-18	695	MOUNTING PLATE - TOP JAMB	28.00	
<input type="checkbox"/>	42182	FAL	SC80-18PA	695	MOUNTING PLATE - PUSH SIDE	28.00	
<input type="checkbox"/>	43066	FAL	SC70-18	689	NARROW FRAME BACK PLATE	47.00	
<input type="checkbox"/>	43067	FAL	SC70-18	695	NARROW FRAME BACK PLATE	47.00	

Page 1 of 2 Viewing 1 - 10 of 18 [Add To Cart](#)

- The cursor will automatically move to the quantity field for the line selected. Enter the quantity desired
 - The quantity can also be directly entered for the line which will automatically select the check box noted in step 4
- Click [Add To Cart](#) The line and quantity selected on the screen is populated below the product selection grid
- Repeat steps 3 through 6 to continue adding products to the order

Review/Modify the Shopping Cart

Each line added to the order or cart will appear below the search grid in the following table

Order Lines

☒ Validate All

☐ Collapse All

Total Price: ~~148.00~~

Line	Label	Item	Qty	UOM	Net Price	Total Price
1		CloserAccessory	5	EA	29.60	148.00
		CloserAccessory	Line Details			Remove
		<div>SKU = 42123</div> <div>Finish = 689</div> <div>Discount = 1</div>	<div>Catalog Number = SC60-18PA</div> <div>Description = MOUNTING PLATE - PUSH SIDE</div>		View Image	

Heading	Description
Validate All	Validate Lines that "Require Attention" See Require Attention Section
Collapse/Expand All	Collapses or Expands the line details
Line Number	Line on which the product is ordered
Label	User Defined Field to identify the product
Item	Contains a listing of the product placed in the cart
Qty	The quantity placed in cart, can be change by clicking in the box and typing in a new number
UOM	Unit of Measure
Net Price	Buying program price of the unit
Total Price (in the line)	Net Price multiplied by the quantity
Total Price (in the header)	Sum of each lines' total price
Remove	Remove the line from the cart


Deleting an Item from the Cart

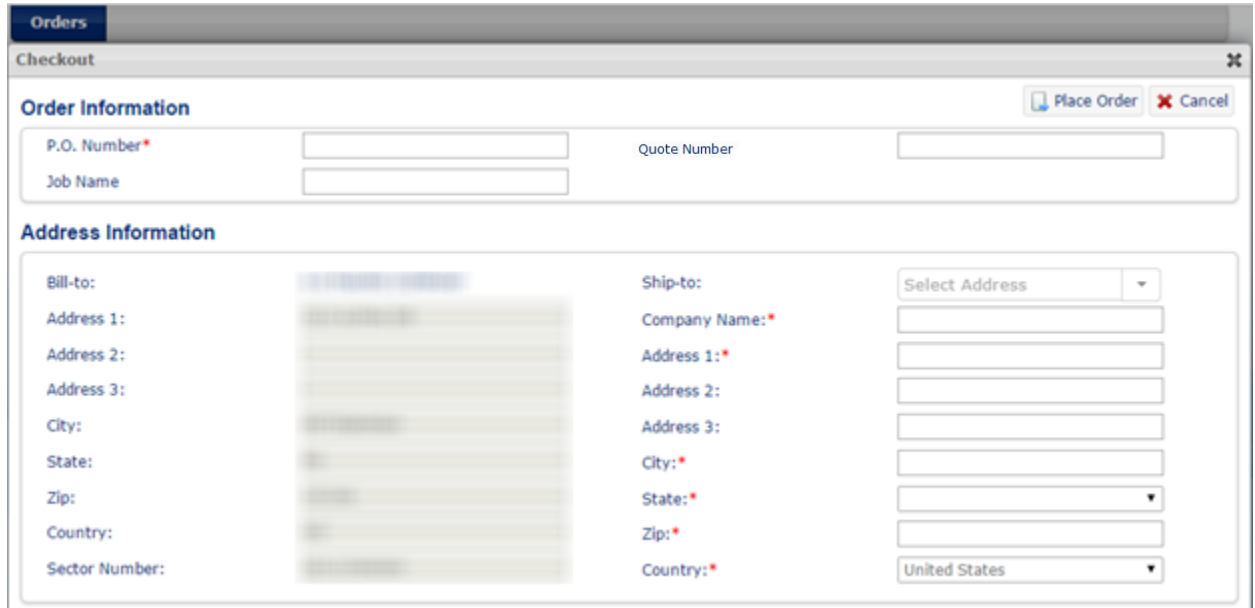
Click Remove on the line which should be removed from the cart

Order Lines


<input checked="" type="checkbox"/> Validate All		<input type="checkbox"/> Collapse All		Total Price: 148.00 148.00		
Line	Label	Item	Qty	UOM	Net Price	Total Price
1		CloserAccessory	5	EA	29.60	148.00
		CloserAccessory	Line Details		Remove	
		SKU = 42123 Finish = 689 Discount = 1	Catalog Number = SC60-18PA Description = MOUNTING PLATE - PUSH SIDE		View Image	

Placing an Order

1. Once all lines have been added to the cart click  located in the top right of the window



The screenshot shows a 'Checkout' window with a title bar and a close button. Inside, there's a 'Place Order' button and a 'Cancel' button. The window is divided into two main sections: 'Order Information' and 'Address Information'. The 'Order Information' section has fields for 'P.O. Number' (marked with a red asterisk), 'Job Name', and 'Quote Number'. The 'Address Information' section is split into 'Bill-to' and 'Ship-to' columns. The 'Bill-to' column has fields for Address 1, Address 2, Address 3, City, State, Zip, Country, and Sector Number. The 'Ship-to' column has a 'Select Address' dropdown, 'Company Name' (marked with a red asterisk), Address 1 (marked with a red asterisk), Address 2, Address 3, City (marked with a red asterisk), State (marked with a red asterisk), Zip (marked with a red asterisk), and Country (marked with a red asterisk). The Country dropdown is currently set to 'United States'.

2. Fill out all fields with an *
 - a. A quote number can also be added to an order. The system will only accept one quote number per order.
3. The Bill-to information will populate automatically
4. Ship-to address will be blank. The address can be populated by:
 - a. Typing the start of the address in the ship-to field to determine if the address is pre-loaded. Then clicking the preloaded address
 - b. Clicking Add New Address in the drop down, then typing in the address in the Name, Address etc. fields
5. Once all information is entered click on  in the top right of the window
6. Upon successful transmission of the order, a confirmation window will appear

Checkout - SOMF000002

Your order has been transmitted. You will receive an order acknowledgement of purchase order number TEST FOR USER GUIDE shortly.

The Allegion order number and scheduled ship date for your order will be reflected on the relevant order acknowledgement.

Please contact Customer Care at 877-671-7011 if you do not receive your acknowledgement within 24 hours.


OK

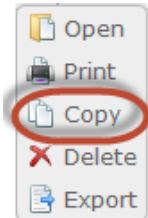
7. The order has been placed and will be received at the ship to address in 5 days.

Special Features

Copying an Order

To save time entering products, any existing order can be copied into a new order.

1. Click on the  icon located to the left of the order that is to be copied
2. The icon will expand options for the order selected, click copy




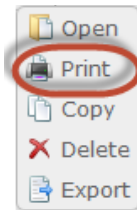
3. A new order will be created with all the lines copied for the existing order
4. This order will require validation to ensure accurate price and configuration. Click

 Validate All

Apply the latest information and clear any validation error

Printing an Order

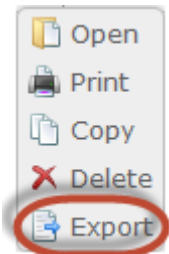
1. Click on the  icon located to the left of the order to be printed
2. The icon will expand options for the order selected, click Print



3. Select the options from the open dialog. For the most part, the defaults below provide all the information required.

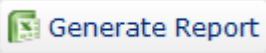
4. Click  in the upper right corner

Exporting an Order



The export selection generates an XML output of the order and is currently only used for technical support.


Generate a Customized Report of Orders

1. From the Order Search Screen click on 
2. Customize the filter options as desired and click Generate Report

Generate Report

Filter Options

Customer	<input type="text"/>	PO #	<input type="text"/>
Created On	<input type="text"/>	Created By	<input type="text"/>
Modified On	<input type="text"/>	Modified By	<input type="text"/>
Order No	<input type="text"/>	Sort Column	Modified On ▼
Status	--Select-- ▼	Sort Direction	<input checked="" type="radio"/> Asc <input type="radio"/> Desc
Order Type	--Select-- ▼		

3. Click  to export the report to Word, PDF or Excel

Additional Troubleshooting

Attention Required List on Line in Shopping Cart

77	<input type="text"/>	Lock	4	EA	<input type="button" value="Remove"/>
Line Instructions					
SKU = 043156890392 Catalog Number = B1015 DANE 134 Finish = 626 Description = PASSAGE SET					
78	<input type="text"/>	Key	1	EA	<input type="button" value="Remove"/>
Line Instructions					
SKU = 043156885657 Catalog Number = KB628 SFIC E Finish = Description = IC KEY BLANK					
79	<input type="text"/>	Key	3	EA	<input type="button" value="Remove"/>
Line Instructions					
80	<input type="text"/>	Lock	6	EA	<input type="button" value="Remove"/>
Line Instructions					
SKU = 043156890415 Catalog Number = B511P6 DANE 134 Finish = 626 Description = ENTRY / OFFICE LOCK					

To clear the highlighted lines follow the steps below

1. Click
2. Click to see the details of the line(s) which require attention
3. Check for BP1 error as noted in the screenshot below

[Add To Cart](#)

Order Lines

☒ Validate All
 ☐ Collapse All

Total Price:

Line	Label	Item	Qty	UOM	Net Price	Total Price
1		Lock	1	EA	Attention Required	
<div style="display: flex; justify-content: space-between;"> Line Instructions Remove </div> <div style="display: flex; justify-content: space-between;"> <div> SKU = 043156145003 Finish = 613 <div style="border: 2px solid red; border-radius: 10px; padding: 5px; width: 60%;"> Error BP1: Not open to purchase this product. Please contact Customer Care. = </div> </div> <div> Catalog Number = D211B 134 Description = CLASSRM DEADBOLT </div> </div>						
2		Lock	3	EA	Attention Required	
<div style="display: flex; justify-content: space-between;"> Line Instructions Remove </div> <div style="display: flex; justify-content: space-between;"> <div> SKU = 043156145256 Finish = 613 <div style="border: 2px solid red; border-radius: 10px; padding: 5px; width: 60%;"> Error BP1: Not open to purchase this product. Please contact Customer Care. = </div> </div> <div> Catalog Number = D211P6 134 Description = CLASSRM DEADBOLT </div> </div>						

4. If error message is as above, proceed to next step. Otherwise, proceed to the step 7
5. Customer is not open to order this product. If in error contact customer care
6. To continue with the order, the line with the error must be removed from the cart. Click Remove in the far right hand corner
7. Click and confirm the line no longer requires attention
 - a. If the line still has Attention Required, send an email with the a screenshot of the item to SpeXtrahelp@allegion.com